FINBOA
Financial Back Office Automation

Grow Your Treasury Business

with FINBOA Treasury Onboarding Solution

Digital, Automated, Intelligent. Experience Faster Time to Revenue and Increased Sales.

What is stopping your treasury onboarding from being a best-in-class growth driver? Is your team slowed by paperwork, tedious or inconsistent reviews, information that is not actionable or auditable? Is your program increasing the risk to your financial institution over time? Do you lack controls and clear processes? FINBOA Treasury Onboarding will modernize your treasury program to focus on growth and customer satisfaction.

With FINBOA Treasury Onboarding solution you can remove friction from your onboarding process, resulting in faster time to revenue and more sales. FINBOA intelligent automation solution modernizes and digitizes the commercial and treasury service application process for treasury sales and operations. Eliminate paper and manual systems and deliver a better client experience. Reduce processing time per application to minutes, automate the back-office and provide on-demand reporting to save time in internal audits.

Paper forms and tedious multi-step processes are eliminated, accelerating your approval process. Automate your annual or periodic performance review workflows and enjoy real-time visibility into onboarding status and performance metrics.

Digitize
No more paper, static forms, spreadsheets and mail. Leverage eSignatures and smart forms.

Analyze
Real-time data audits and analytics at your fingertips for better decision-making.

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Automate
Improve staff and customer satisfaction and allow sales to focus on selling.

Review
Automate annual and periodic review, leveraging analytics and risk scoring.

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Why FINBOA Treasury Onboarding

FINBOA provides banking-specific SaaS solutions serving 130+ banks and credit unions. FINBOA is integrated with most major core providers and we take your data security seriously. We are PCI/DSS compliant. Our intelligent automation and RPA solutions feature pre-built workflows, dashboards, and fast and easy implementation and support an end-to-end digital process. Our solutions are easy to use and easy to train on, and our customer support is responsive and knowledgeable.

Features

Lead Generation Analytics

Smart Forms

Paperless Onboarding and Approvals
- Centralized Document Collection
- Digital Contracting and eSignature
- Secure Document Upload
- Approval Workflows

Automated:
- Approvals
- Audits
- Validation
- Follow-up Tasks

Treasury Product Set-up
- SLA tracking, Status Monitoring

Contracted Product Changes
- Performance Reviews
- Repapering changes

Annual Risk Review

Customer, Account and Service Maintenance
- Modify existing services
- Add services
- Add, change or remove accounts

Benefits

- Drastically reduced processing time and costs
- Sales focused on selling, not tracking paperwork and chasing signatures
- Re-keying eliminated, reducing errors
- Improved time to revenue
- Enterprise-wide access to Commercial and Treasury application data
- Improved client experience with less paperwork and fewer delays
- Greater referral opportunities to convert borrowers into treasury clients
- Real-time visibility into status and performance metrics
- Improved audit control over onboarding and review processes

For more information, go to www.finboa.com or call (866) 218 4096.

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